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Fresh Deciduous Fruit

Annual Report

2008

Approved by:

David Mergen
U.S. Embassy

Prepared by:

Maria Julia Balbi

Report Highlights:

Argentina's CY 2009 total fresh deciduous fruit production is forecast at 1.845 million MT, up 45,000 MT from the previous year, due to higher yields. The total fresh deciduous fruit crop for CY 2008 is expected to decrease to 1.8 million MT, primarily due to frost damage in 2007 which affected apples and pears. Total exports in CY 2009 are estimated to decrease to 800,000 MT as a consequence of the international economic crisis which will affect world demand. Domestic consumption is expected to remain stable, and imports will continue to be negligible.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Annual Report
Buenos Aires [AR1]
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SECTION I. SITUATION AND OUTLOOK

Executive Summary

Post forecasts an increase in fresh deciduous fruit production for CY 2009 to a total of 1.845 million MT due to higher yields. Exports are estimated to decrease to 800,000 MT, despite larger production, as a result of the international economic crisis. Domestic consumption is expected to remain stable. CY 2008 total fresh deciduous fruit production is forecast to decrease to 1.8 million MT due to frost damage the previous year.

Argentina will have to meet lower MRLs (maximum residue levels) standards for Russia in CY 2009 that are below those required by the E.U., Japan, Canada, and the U.S., among other countries. Russia accounts for approximately 30 percent of total Argentine fruit exports.

Production

Total fresh deciduous fruit production for CY 2009 is forecast at 1.845 million MT, and is expected to increase slightly, compared to CY 2008. Although several late frosts occurred in September 2008 in the Southern Valley of Rio Negro Province, from South East to North East, they did not affect blossoms seriously. Good weather conditions also favored table grape crops. Thus, improved yields are expected to be very good next calendar year for apples, pears, and table grapes.

CY 2008 total fresh deciduous fruit production is estimated to decrease to 1.8 million MT, compared to the previous year, due to frost damage in 2007, which mainly affected apples and pears.

	CY 2007		CY 2008		CY 2009	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Apples	35,000	1,100,000	31,000	940,000	32,000	970,000
Pears	26,000	730,000	27,000	710,000	27,000	720,000
Table Grapes	9,500	140,000	9,500	150,000	10,000	155,000
Total	70,500	1,970,000	67,500	1,800,000	69,000	1,845,000

Source: FAS Buenos Aires

CY 2009 fresh apple production is estimated to increase to 970,000 MT and pear production to 720,000, as a result of higher yields resulting from good weather conditions in 2008. Blossoms were very good and producers expect high fruit quality for next calendar year. Some area planted to apples has been devoted for new pear plantations. The reason of this shift is that a significant volume of pear production is exported at higher international prices, while more apples are destined for the domestic market (private sources estimate that about 3 percent of the total planted area is annually replaced with younger plantations). Table grape production is expected to increase to 155,000 MT as good weather condition in 2008 favored blossoms.

CY 2008 fresh apple crop is estimated to decrease to 940,000 MT and fresh pear crop to 710,000 MT due to severe frost damage in 2007. CY 2008 table grape crop is expected to increase to 150,000 MT as younger plantations entered production.

Concentrated apple juice (CAJ) production in CY 2009 is forecast to increase to 50,000 MT as there will be a larger supply of fruit for processing due to less exports. Production in CY 2008 is expected to decrease significantly as a consequence of less fruit availability for the following reasons: lower production, high international prices paid by Russia, which favor exports of fresh apples usually used for processing, and China's oversupply. Moreover, during the past few years, area planted to apples was devoted to new pear plantations.

	CY 2007		CY 2008		CY 2009	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Mendoza	5,000	110,000	4,000	90,000	4,500	100,000
Southern Valley	30,000	990,000	27,000	850,000	27,500	870,000
Total	35,000	1,100,000	31,000	940,000	32,000	970,000

Source: FAS Buenos Aires

	CY 2007		CY 2008		CY 2009	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Mendoza	4,000	100,000	5,000	100,000	5,000	100,000
Southern Valley	22,000	630,000	22,000	610,000	22,000	620,000
Total	26,000	730,000	27,000	710,000	27,000	720,000

Source: FAS Buenos Aires

	CY 2007		CY 2008		CY 2009	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Total	9,500	140,000	9,500	150,000	10,000	155,000

Source: FAS Buenos Aires

	CY 2007	CY 2008	CY 2009
Production	60,000 (+ beginning stocks: 3,633)	42,000	50,000
Exports	60,000	40,000	47,500
Domestic Consumption	3,633	2,000	2,500

Source: FAS Buenos Aires

Organic fresh apple and pear production, destined for niche export markets, has been growing steadily during the past few years, despite 30-percent higher production costs compared to conventional fruit production (production costs for organic apples and pears have increased by 300 percent since 2001). This trend is expected to continue, primarily to supply the U.S. and E.U. markets.

Conventional fruit production costs in CY 2008 increased between 30-40 percent. The highest increases were for labor, energy, and international and domestic freight.

Varieties

Among the bicolor apples, only some Gala and Braeburn clones have succeeded in Argentina. Others, like Fuji, Jonagold and Elstar, did not adapt well to local conditions. Among yellow apples, Golden Delicious is the classic variety. Although it adapted well to Argentina's production conditions, this variety has lost popularity due to marketing problems. Among the red varieties, Red Delicious is the most widespread variety in Argentina. Since it is sterile, it must be crossed with other varieties such as Gala, Fuji, Elstar, Golden Delicious, Granny Smith, Jonathan and Ozarkgold. In Argentina, many Red Delicious clones such as Starkrimson, Red Chief, Hi Early, Top Red Delicious, Oregon Spur, or Red King Oregon and Cooper 8, have been adopted. The second most important apple variety in Argentina is Granny Smith with 20 percent of the planted area.

Among the most popular pear varieties, Bartlett accounts for 35 percent of the Argentine pear production followed by Packham's Triumph. Other varieties are: Red Sensation, Red Bartlett, Beurré D'Anjou, Red Anjou, Abate Fetel (Abbé Fetel), Conference, General Leclerc, and Forelle.

The most popular table grape varieties are Superior Seedless and Red Globe.

Domestic Consumption

Domestic consumption of apples, pears, and table grapes in CY 2009 is expected to remain stable. Although the harvest in CY 2008 was poor, apple domestic consumption is estimated to increase with detriment to fruit for processing. Pear domestic consumption is forecast to decrease due to lower production and larger exports, and table grape consumption will increase due to larger production.

Post is revising apple fresh domestic consumption and use for processing due to data indicating the need to adjust upwards fresh consumption and reduce use for processing.

Trade

Post forecasts overall fresh deciduous fruit exports for CY 2009 to drop to 800,000 MT, as a consequence of the current international financial crisis, which will decrease world demand. The devaluation, vis-à-vis the dollar and Argentine peso, of local currencies in several export markets, such as Brazil, Russia, and the EU, is already affecting trade and is expected to decrease exports. However, this might be partially offset by a poor apple and pear harvest in the northern hemisphere (Italy, Belgium), and larger production in Argentina.

CY 2009 apple exports will decrease slightly to 260,000 MT, pear exports to 470,000 MT, and table grape exports are estimated to remain stable, compared to the previous year.

Russia is implementing a new policy on MRLs that will affect fresh fruit trade in 2009. Russia accounts for about 30 percent of total fruit exports from Argentina (see under Import Restrictions and Phytosanitary Issues). The new standards could affect local producers in order to continue supplying the Russian market.

CY 2008 apple exports are expected to decrease slightly due to lower production. Pear exports are forecast to increase, despite a shortage in supply, as a consequence of strong demand and high international prices which encourage exports. Table grape exports are also expected to increase due to high international prices and strong demand.

CY 2009 CAJ exports are estimated to rebound to 47,500 MT due to larger production. CY 2008 exports are forecast to decrease significantly to 40,000 MT due to less fruit availability for processing. Local processors do not foresee a rapid decrease of the demand in the U.S., the largest export market for Argentine CAJ, as a consequence of the current international economic crisis.

Partner Country	2006		2007		2008 (Jan-Aug)	
	USD	MT	USD	MT	USD	MT
World	401,101,127	706,198	489,467,722	795,850	535,490,822	709,250
E.U.	176,653,022	287,711	191,685,821	300,674	218,548,020	279,089
Russia	73,757,209	14,5553	96,638,431	174,200	141,695,079	203,665
Brazil	94,612,039	16,8570	115,815,151	179,481	108,968,873	134,274
United States	25,913,841	46,974	38,477,902	64,647	28,660,318	40,626
Others	30,165,016	57,390	46,850,417	76,848	37,618,532	51,596

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Partner Country	2006		2007		2008 (Jan-Aug)	
	USD	MT	USD	MT	USD	MT
World	116,646,444	237,290	157,929,159	283,067	155,286,593	214,956
E.U.	49,828,508	95,759	64,446,296	110,365	64,606,349	84,824
Brazil	30,681,084	58,591	35,143,923	58,352	24,009,089	28,413
Russia	22,640,406	51,498	34,771,599	67,319	47,228,384	71,981
United States	812,718	1,471	283,3851	4,499	1,745,044	2,119
Others	12,683,728	29,971	20,733,490	42,532	17,697,727	27,619

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Partner Country	2006		2007		2008 (Jan-Aug)	
	USD	MT	USD	MT	USD	MT
World	210,816,662	395,945	269,499,810	454,005	306,462,583	435,277
E.U.	76,187,738	145,160	90,083,694	157,224	112,666,843	162,469
Brazil	59,218,653	104,061	73,359,061	112,901	75,339,921	97,412
Russia	35,722,831	77,097	49,521,368	94,991	74,559,418	115,696
United States	25,082,905	45,476	35,480,243	59,967	26,655,533	38,291
Ohters	14,604,535	24,151	21,055,444	28,922	17,240,868	21,409

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Partner Country	2006		2007		2008 (Jan-Aug)	
	USD	MT	USD	MT	USD	MT
World	73,638,021	72,963	62,038,753	60,000	73,741,646	59,017
E.U.	50,636,776	46,792	37,155,831	33,000	41,274,828	31,796
Brazil	4,712,302	5,918	7,312,167	8,000	9,619,863	8,449
Russia	15,393,972	16,958	12,345,464	12,000	19,907,277	15,988
United States	1,8218	27	163,808	180	259,741	216
Others	2,876,753	3,268	5,061,483	6,820	2,679,937	2,568

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Partner Country	2006		2007		2008 (Jan-Aug)	
	USD	MT	USD	MT	USD	MT
World	53,887,628	60,168	63,651,830	57,857	42,091,719	24,428
United States	50,585,170	56,646	59,860,102	54,494	40,290,014	23,396
Russia	1,494,426	1,679	672,006	686	539,616	370
E.U.	325,707	258	625,959	382	579,953	247
Others	1,482,325	1,585	2,493,763	2,295	682,136	415

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Fresh deciduous fruit and CAJ imports are negligible since Argentina is a net producer and exporter of apples, pears, table grapes, and concentrated apple and pear juice (CY 2008 CAJ production is forecast at 42,000 MT, and concentrated pear juice production, at 25,000 MT).

In CY 2007, Argentina imported 27 MT of fresh pears valued at \$25,204. Imports of table grapes have been increasing in the past couple of years, totaling \$1.3 million MT in CY 2007. Main countries of origin were Brazil and Chile.

Import and Export Regulations

Argentina has an export tax of 10 percent for fresh apples, pears, and table grapes, with part of the tax rebated depending on the size of the container. The export tax for CAJ is 5 percent, with part of the tax also rebated depending on the size of the container.

Table 11. Fresh Apples (0808.10) & Pears (0808.20)	
Outside the Mercosur area	
Import Tariff (%)	10.00
Statistical Tax (%)	0.50
Export tax (%)	10.00
Export Rebate (%) Cases containing between 2.5 Kg. and 20 Kg. Cases containing 2.5 Kg. or less	5.00 6.00
Within the Mercosur area	
Import tariff (%)	0.00
Export tax (%)	10.00
Export Rebate (%) Cases containing between 2.5 and 20 kg. Cases containing 2.5 kg. or less	5.00 6.00

Table 12. Fresh Table Grapes (0806.10)	
Outside the Mercosur area	
Import Tariff (%)	10.00
Statistical Tax (%)	0.50
Export tax (%)	10.00
Export Rebate (%) Cases containing between 2.5 Kg. and 20 Kg. Cases containing 2.5 Kg. or less	4.50 6.00
Within the Mercosur Area	
Import tariff (%)	0.00
Export tax (%)	10.00
Export Rebate (%) Cases containing between 2.5 and 20 kg. Cases containing 2.5 kg. or less	5.00 6.00

Table 13. Concentrated Apple Juice (2009.79)	
Outside the Mercosur Area	
Import Tariff (%)	14.00
Statistical Tax (%)	0.50
Export tax (%)	5.00
Export Rebate (%) Containers larger than 1 liter Containers of 1 liter or less	4.05 6.00
Within the Mercosur Area	
Import tariff (%)	0.00
Export tax (%)	4.05
Export Rebate (%) Containers larger than 1 liter Containers of 1 liter or less	5.00 6.00

Factors Affecting Industry Structure

Farm strike

Fruit shipments were disrupted during the Argentine farm strike, which affected transportation throughout the country for extended periods during March to June of 2008. Transportation has returned to normal since the end of the farm strike.

Government Support to Producers

In 2002, the Government of Neuquen Province implemented a voluntary Compensation Fund for Fruit Producers for producers who want to insure, at least, part of their harvest against hail damage. If over 50 percent of the harvest is damaged, the fund will cover the full harvest. Over 90 percent of producers have adhered to this Fund. The Government of Rio Negro Province has a similar system to help fruit producers face challenges affecting the sector.

Prices

In CY 2008, international prices for fresh deciduous fruit and CAJ reached very high levels due to world sustained demand (apples: \$861/MT in August, pears: \$925/MT in July; table grapes: \$1,723/MT in June; and CAJ: \$1,935/MT in February). However, during the second part of the year, prices decreased due to China's oversupply and devaluation of local currencies in some of the most important export markets. During CY 2008, CAJ international prices fell from US\$10/gallon in July-September, to US\$5/gallon in November.

The following tables show average export prices for CY 2007 and 2008:

Month	2007	2008 (Jan-Aug)
Jan	546	691
Feb	548	688
Mar	536	672
Apr	544	713
May	569	765
Jun	556	793
Jul	555	828
Aug	562	861
Sep	579	
Oct	627	
Nov	647	
Dec	673	
Average	579	
Exchange rate	3.33	Local currency/US\$1
Date of Quote	11/14/2008	

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Table 15. FOB Prices (US\$/MT)		
Fresh Pears		
Month	2007	2008 (Jan-Aug)
Jan	553	678
Feb	550	650
Mar	564	672
Apr	566	706
May	560	749
Jun	643	828
Jul	714	925
Aug	735	918
Sep	746	
Oct	845	
Nov	972	
Dec	996	
Average	704	
Exchange rate	3.33	Local currency/US\$1
Date of Quote	11/14/2008	

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Table 16. FOB Prices (US\$/MT)		
Fresh Table Grapes		
Month	2007	2008 (Jan-Aug)
Jan	1034	1289
Feb	1031	1208
Mar	967	1167
Apr	930	1221
May	679	1179
Jun	737	1723
Jul	211	
Aug	0	
Sep	0	
Oct	0	
Nov	0	
Dec	1261	
Average	856	
Exchange rate	3.33	Local currency/US\$1
Date of Quote	11/14/2008	

Source: FAS Buenos Aires based on data from the Global Trade Atlas

Month	2007	2008 (Jan-Aug)
Jan	924	1070
Feb	895	1935
Mar	969	1328
Apr	979	1906
May	1021	1759
Jun	1104	1784
Jul	1100	1751
Aug	1168	1565
Sep	1196	
Oct	1114	
Nov	1328	
Dec	1266	
Average	1089	
Exchange rate	3.33	Local currency/US\$1
Date of Quote	11/14/2008	

Source: FAS Buenos Aires based on data from the Global Trade Atlas

The following table illustrates retail prices for fresh apple, pear and table grape varieties most widely sold in Argentina:

	Variety	Price (US\$/Kg)
Pears	Packam	1.95
Apples	Red Delicious	2.10
	Granny Smith	2.10
Table Grapes	Red Globe (imported from Brazil and Chile)	5.10

Source: FAS Buenos Aires based on data from local supermarkets

The following table illustrates wholesale prices for all varieties of fresh apples, pears, and table grapes:

	2006		2007			2008		
	Pears	Apples	Pears	Apples	Grapes	Pears	Apples	Grapes
January	0.43	0.57	0.52	0.49	0.58	0.71	0.85	0
February	0.32	0.50	0.40	0.53	0.44	0.53	0.89	0.65
March	0.29	0.34	0.34	0.38	0.37	0.48	0.83	0.59
April	0.28	0.33	0.36	0.40	0.45	0.49	0.88	0.61
May	0.30	0.41	0.42	0.45	0.51	0.56	0.89	0.69
June	0.37	0.44	0.38	0.46	0.49	0.60	0.99	
July	0.41	0.50	0.42	0.52	0.56	0.67	0.99	
August	0.49	0.49	0.43	0.50	0	0.71	1.10	
September	0.63	0.53	0.48	0.54	0	0.81	1.11	
October	0.65	0.55	0.54	0.59	0	0.79	1.02	
November	0.68	0.62	0.59	0.65	0			
December	0.00	N/A	0.62	0.72	0			
Annual average	0.44	0.48	0.46	0.52	0.49			

Source: FAS Buenos Aires based on data provided by the Buenos Aires Central Market (www.mercadocentral.com.ar)

Import Restrictions and Phytosanitary Issues

Russia (second largest market for Argentine fresh fruit) implemented a "temporary import restriction" for Argentine apples, pears, table grapes, and citrus fruit until they complied with lower MRLs, starting October 1, 2008. As a result of negotiations between phytosanitary authorities in both countries, the Russian phytosanitary authorities agreed to postpone for 60 days the implementation of this new requirement. The new MRL levels are lower than those required by the E.U., Japan, Canada, and the U.S, among other countries. The local industry is concerned about this new measure as Russia accounts for about 30 percent of total Argentine fruit exports. Local producers will adjust to the new measure during the CY 2009 season.

Two years ago, the Argentine Government phytosanitary authorities implemented a National Carpocapsa Erradication Program, which has managed to keep the plague under control.

II. STATISTICAL TABLES

Apples, Fresh Argentina	2006			2007			2008			
	2006/2007			2007/2008			2008/2009			
	Market Year Begin: Jan 2007			Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			
	Annual Data Displayed	New Post Data		Annual Data Displayed	New Post Data		Annual Data Displayed	Jan Data		
Area Planted	35	35	35000	35	35	31000	35		32000	(HA)
Area Harvested	30	30	30000	30	30	26000	30		26000	(HA)
Bearing Trees	21000	21000	21000	21000	21000	27000	21000		27000	(1000 TREES)
Non-Bearing Trees	3000	3000	3000	3000	3000	4500	3000		5000	(1000 TREES)
Total Trees	24000	24000	24000	24000	24000	31500	24000		32000	(1000 TREES)
Commercial Production	1100000	1100000	1100000	990000	990000	940000	1000000		970000	(MT)
Non-Comm. Production	0	0	0	0	0	0	0		0	(MT)
Production	1100000	1100000	1100000	990000	990000	940000	1000000		970000	(MT)
Imports	150	150	0	0	0	760	0		0	(MT)
Total Supply	1100150	1100150	1100000	990000	990000	940760	1000000		970000	(MT)
Fresh Dom. Consumption	190150	190150	190000	170000	170000	240760	150000		240000	(MT)
Exports, Fresh	270000	270000	280000	250000	250000	270000	270000		260000	(MT)
For Processing	640000	640000	630000	570000	570000	430000	580000		470000	(MT)
Withdrawal From Market	0	0	0	0	0	0	0		0	(MT)
Total Distribution	1100150	1100150	1100000	990000	990000	940760	1000000		970000	(MT)
TS=TD			0			0			0	
Comments										
AGR Number										
Comments To Post										

Pears, Fresh Argentina	2006			2007			2008			
	2006/2007			2007/2008			2008/2009			
	Market Year Begin: Jan 2007			Market Year Begin: Jan 2008			Market Year Begin: Jan 2008			
	Annual Data Displayed	New Post Data		Annual Data Displayed	New Post Data		Annual Data Displayed	Jan Data		
Area Planted	26	26	26000	26	26	27000	26		27000	(HA)
Area Harvested	22	22	22000	22	22	23000	22		23000	(HA)
Bearing Trees	22000	22000	22000	22000	22000	23000	22000		23000	(1000 TREES)
Non-Bearing Trees	4000	4000	4000	4000	4000	4500	4000		5000	(1000 TREES)
Total Trees	26000	26000	26000	26000	26000	27500	26000		28000	(1000 TREES)
Commercial Production	730000	730000	730000	700000	700000	710000	750000		720000	(MT)
Non-Comm. Production	0	0	0	0	0	0	0		0	(MT)
Production	730000	730000	730000	700000	700000	710000	750000		720000	(MT)
Imports	50	50	27	0	0	30	0		0	(MT)
Total Supply	730050	730050	730027	700000	700000	710030	750000		720000	(MT)
Fresh Dom. Consumption	110050	110050	110027	100000	100000	80030	110000		80000	(MT)
Exports, Fresh	450000	450000	450000	440000	440000	480000	470000		470000	(MT)
For Processing	170000	170000	170000	160000	160000	150000	170000		170000	(MT)
Withdrawal From Market	0	0	0	0	0	0	0		0	(MT)
Total Distribution	730050	730050	730027	700000	700000	710030	750000		720000	(MT)
TS=TD			0			0			0	
Comments										
AGR Number										
Comments To Post										

Grapes, Table, Fresh Argentina	2006			2007			2008		
	2006/2007			2007/2008			2008/2009		
	Market Year Begin: Jan 2007			Market Year Begin: Jan 2008			Market Year Begin: Jan 2009		
	Annual Data Displayed	New Post Data		Annual Data Displayed	New Post Data		Annual Data Displayed	Jan Data	
Area Planted	10.300	9.500	9.500	10.400	9.500	9.500	10.400	10.000	10.000
Area Harvested	9.500	9.200	9.200	9.500	9.200	9.200	9.500	9.500	9.500
Commercial Production	140.000	140.000	140.000	150.000	150.000	150.000	150.000	155.000	155.000
Non-Comm. Production	0	0	0	0	0	0	0	0	0
Production	140.000	140.000	140.000	150.000	150.000	150.000	150.000	155.000	155.000
Imports	0	1.000	1.000	0	1.200	1.200	0	1.100	1.100
Total Supply	140.000	141.000	141.000	150.000	151.200	151.200	150.000	156.100	156.100
Fresh Dom. Consumption	47.000	47.000	47.000	50.000	50.000	50.000	50.000	50.000	50.000
Exports, Fresh	73.000	59.000	59.000	75.000	70.000	70.000	75.000	70.000	70.000
For Processing	20.000	35.000	35.000	25.000	31.200	31.200	25.000	36.100	36.100
Withdrawal From Market	0	0	0	0	0	0	0	0	0
Total Distribution	140.000	141.000	141.000	150.000	151.200	151.200	150.000	156.100	156.100
TS=TD			0			0			0
Comments									
AGR Number									
Comments To Post									